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ABSTRACT

This paper, the introductory chapter to a forthcoming book ("Financing Recurrent Education"), discusses the political and economic dimensions of life-long learning (recurrent education) and suggests methods by which a recurrent education system might be constructed and financed. The decline in youthful labor force entrants and forecasted changes in technology and the labor force are producing a need for a system that provides opportunities for education and training throughout the life cycle of workers. The author presents nine different motives for advocating the expansion of recurrent education and points out that this very diversity of approaches and motives may be the greatest political obstacle to its adoption and implementation. A bibliography is included. (MD/MLF)

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SCHOOL OF EDUCATION STANFORD UNIVERSITY

Policy Paper No. 83-C2

ECONOMIC AND POLITICAL DIMENSIONS OF RECURRENT EDUCATION

Henry M. Levin
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May 1983

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Abstract

A decline in young labor force entrants and a rapid transformation of industries and occupations have created new demands for a system of life-long learning or recurrent education to retrain the existing labor force. Recurrent education would enable individuals to obtain further education and training over their entire work careers in a recurring manner, i.e., in alternation with work and leisure. However, despite the strong case for a system of recurrent education, no such system has emerged in the U.S.

The purpose of this paper is to discuss both political and economic dimensions of recurrent education as well as to suggest methods by which a system might be constructed and financed. This essay is the introductory chapter to a book that will be published in late 1983: FINANCING RECURRENT EDUCATION (Beverly Hills: Sage Publications). In addition to the overall issues, reference is made to the other essays that will be published in the book.

In the latter part of the twentieth century, the industrialized countries of the world will be facing a major educational and training challenge as labor force growth slows and technological change accelerates. There will be a rapid transformation of industries and occupations as economic shifts among nations and the introduction and application of new technologies create vast changes in the workplace. At the same time the growth of the labor force and particularly the entry of newly educated workers will fall to unprecedentedly low levels so that the newly trained labor market entrants can not be relied upon to sustain the changes that lie ahead. Without question the U.S., western Europe, and other industrialized nations will have to pursue new educational and training strategies to prepare their existing labor forces for the new occupational demands. This essay represents a summary of the joint activity of the Institute for Research on Educational Finance and Governance (IFG), Stanford

University and the Center for Educational Research and Innovation of the Organization for Economic Cooperation and Development in Paris on methods and issues related to financing a responsive system of recurrent education. Since the papers from that study will be published in an edited volume (Levin and Schutze 1983), we refer to the individual papers that will be found in the book.

In its broadest definition, recurrent education is "a comprehensive educational strategy for all post-compulsory or post-basic education, the essential characteristic of which is the distribution of education over the total life span of the individual in a recurring way, i.e. in alternation with other activities such as work, but also with leisure and retirement (OECD 1973: 24)."

This definition of recurrent education contains two essential elements: First, it offers an alternative educational strategy to the conventional one by which all formal and full-time education is concentrated in youth, for it proposes to spread post-compulsory education over the full life span of the individual. Thus, it accepts the principle of lifelong learning.

Second, it proposes a framework within which lifelong learning will be organized, this being the alternation and effective interaction between education, as a structural learning situation, and other social activities during which learning occurs. This general definition of recurrent education, contains two properties. It refers to educational offerings which are flexible in structure and content,

and it refers to educational experiences that will be available over the life-cycle of an individual.

Under present conventions, formal education and training for most individuals takes place prior to entering the labor force or in the first few years of work experience. During the remainder of the life cycle, further education and training constitute an exception for all but a few persons in relatively high level occupations. For males the work career is often an uninterrupted period in the absence of unemployment or occupational change. For females, voluntary interruptions are more likely to address child rearing and family, with surprisingly little pursuit of further education and training as a basis for labor market re-entry. That is, present education and training practices tend to be relatively rigid, without accommodating the need to retrain for new careers or to adapt to technological change.

A system of recurrent education would alter this traditional pattern by providing opportunities for education and training throughout the life-cycle. Typically, individuals would alternate or intersperse periods of work and education to meet both personal needs and those of employers. A system of alternative educational and training opportunities would be constructed that would incorporate many of the existing offerings such as apprenticeships, extension courses, on-the-job training, college and university courses of study, correspondence courses, and technical schools as well as new offerings and approaches that addressed needs that were not being served. Such

educational and training experiences should be provided both inside and outside the workplace as well as through educational television and computer-assisted instruction. Availability of these offerings must be highly flexible with opportunities provided on weekends and evenings as well as during regular work hours.

Many aspects of recurrent education already exist, but the present opportunities fall considerably short of an integrated system for two reasons. First, the present approach is highly fragmented and reflects more a motley collection of educational and training possibilities of a confusing and uncoordinated nature than a systematic approach to recurrent education. Although a recurrent educational approach might surely incorporate all or most of the existing opportunities, they would be part of a more systematic and purposive approach to the overall educational and training strategies of societies. In this respect, availability, access, and comprehensiveness become of far greater concern than they are in the present system. Second, a system of recurrent education provides a more systematic approach with respect to the financing of recurrent educational opportunities and the provision of sufficient time away from the workplace to pursue them. Indeed, a major purpose of this work is to consider alternative ways of providing a comprehensive system of financing recurrent education that will provide equity in access, flexibility and adaptability in responding to needs, and efficiency in the use of private and social resources.

In summary, a recurrent educational approach would go beyond the existing offerings to provide a systematic approach regarding such matters as finance, information, coordination, educational leave for workers, and certification of training experiences. Heavy emphasis would be placed on a total system of opportunities for individuals, small groups, and employers in molding the overall menu of offerings according to their needs and demands.

Constructing a System of Recurrent Education

Major components of recurrent education have been around for some time in the form of on-the-job training, adult education, correspondence courses, continuing education, extension courses, and the movement towards lifelong learning (Mushkin 1964; Peterson 1979). Certainly since the early seventies, there has been a movement around the world to improve the efficiency, equity, and flexibility of education through greater attention to lifelong learning (Faure 1973; Emmerij 1974). Thus, a crucial question that must surely be raised is why these movements have not been welded together into a system of recurrent education.

This question can best be answered by reference to the different concepts and notions of recurrent education. Although recurrent and lifelong education have been used to refer to education and training over the life span, the generalization in terminology tends to gloss over the great diversity in underlying approaches as well as social and educational concerns. Table One provides a summary of nine relatively distinct motives that seem to be behind the arguments for

recurrent education. Each of these tends to suggest a specific target clientele and set of offerings, and in many case the overlap among clientele and offerings is minimal.

(1) Increasing Productive Efficiency

The view that recurrent education can improve productive efficiency proceeds largely from the assumption that worker skills have a tendency to become obsolete under conditions of rapid technological change. As the nature of jobs evolves with new capital investment, workers will need to learn new skills or refresh old ones to adapt them to new technologies. According to this perspective, recurrent education provides the flexibility for retraining workers as skill rejuvenation is needed. Such an approach can improve worker productivity and earnings as well as increase the productivity of the firm and its profitability. Or, in time of rapid technical progress and change, recurrent education might "maintain" productivity of workers which would otherwise decline in the absence of such an intervention. There is a particular incentive for employers to promote this approach, especially to the extent that recurrent education can reduce costs of training through economies of scale and can shift a portion of training costs from the private to the public sector.

The target clientele for this version of recurrent education is the existing workforce as well as persons who are planning to re-enter the workforce after periods of absence. Housewives who have left employment to raise children would be a good example of the latter.

Table One--Different Versions of Recurrent Education

	Motive	Rationale	Principal Clientele	Principal Forms
1.	Increasing Productive Efficiency	Increase worker productivity and adaptation to technical change	Workers and persons re-entering labor market	Job oriented education and training
2.	Reducing Unemployment	Use of recurrent education to share existing jobs	Labor Force	Educational leave and sabbaticals to rotate existing jobs
3.	Reducing Overeducation and Underemployment	Providing educational opportunities throughout working life to reduce demand for tertiary education before entering workplace	Workers	Diversity of educational and training opportunities as needed over working life
4.	Worker Participation	Improve conditions of work and worker participation	Workers	Training in skills and knowledge necessary for worker participation in decisions
5.	Improving Quality of Leisure	Improve ability to use leisure hours productively	All adults	Emphasis on music, poetry, art and other forms of intellectual, cultural, and recreational development
6.	Reducing Inequalities of Disadvantaged	Compensating for inequalities of worker social backgrounds and previous educational experiences to increase their mobility	Unemployed and unskilled workers	Basic academic skills and further job training
7.	Improving Social Participation	Providing knowledge for greater social and political participation to improve their conditions	Non-professional and non-managerial workforce, housewives, and senior citizens	Political and family education as well as arts and human needs

Table One--Continued

	Motive	Rationale	Principal Clientele	Principal Forms
8.	Rescuing Educational Institutions	New clientele and functions for Postsecondary institutions faced with falling enrollments	Adults	Courses and degrees according to demand
9.	Deschooling Society	Reducing coercion of mandatory schooling and bureaucracy of traditional educational institutions for greater individual freedom and choice by creating more flexible and responsive offerings	All persons beyond primary age	Whatever is demanded in educational marketplace

The types of experiences that would be offered would be ones that were specifically vocational in nature to train persons for changing work roles and job requirements. The principal argument for public support of recurrent education for productive efficiency is that such an effort would increase national productivity and economic growth, while reducing inflation (through providing productivity gains commensurate with rising wages) and making products more competitive in world markets.

(2) Reducing Unemployment

A related motive for providing recurrent education is the role that it might play in reducing unemployment. However, what is referred to here is the use of recurrent education to rotate workers between periods of employment and periods of training, enabling a larger portion of the labor force to experience regular employment. By providing recurrent education for experienced workers at any point in time, job openings are provided for new members. Of course, to the degree that it improved the productivity of the labor force and made a country's goods more competitive in world markets, it might also contribute to job expansion.

Clearly, the audience for such an approach is that of the labor force, but recurrent educational offerings can take several forms. Of most importance is the emphasis on recurrent education as an "active labor market policy" (Meidner and Anderson 1973) as advocated by Rehn (1983) and Emmerij (1983). Thus the approach requires provisions for inducing persons to leave the workforce to take further training or

other types of educational experiences. One possible version is to create incentives for persons to take such leave when there is high unemployment in their industries or when retraining is needed to respond to technical change. Other versions would make all workers eligible for such sabbaticals, with the expectation that they might be pursued most frequently when workers have incentives for retraining or switching careers to more prosperous sectors of the economy. While there is some overlap with the productive efficiency motive for recurrent education, the emphasis on the direct reduction of unemployment and underemployment is grounds for viewing this approach as distinct.

(3) Reducing Overeducation and Underemployment

In a very different sense, recurrent education also can be viewed as a vehicle for reducing the large numbers of overeducated members of the workforce found in many societies. Although there may be a growing shortage of certain skills in their economies as industrial reorganization and technical change accelerate, there is presently a surplus of persons with post-secondary education in virtually all of the western, industrialized countries. The phenomenon of "over-education" or underutilization of educated labor tends to waste resources in terms of training persons who will not be able to obtain appropriate jobs in the careers for which they are trained (Freeman 1976; Rumberger 1981). At the same time it can represent a major source of social and political ferment as the job expectations of university and other post-secondary graduates are not fulfilled (Levin

1976). The increasing costs of post-secondary education at a time of national fiscal crises in conjunction with an inability to employ graduates at appropriate job levels has stimulated a search for ways to reduce the demands by students and their families for traditional forms of higher education. However, given that education has been perceived as the main channel for upward mobility by the vast majority of the population, the demands for university participation will not be significantly reduced unless there are alternative channels of mobility.

In this respect, the provision of ample recurrent educational opportunities can be seen as a way of assuring secondary graduates that they need not undertake all of their educational experiences prior to entering the labor market. Presumably, under a system of recurrent education, employers would be expected to hire more secondary graduates and encourage them to seek out recurrent educational offerings that enable them to meet both their own needs and those of their employers. If such a shift from traditional timing and forms of post-secondary education to recurrent education were successful, it might reduce the initial demand for university training and its consequences for increasing the number of over-educated. That is, recurrent education would be used to "cool off" the high demand for participation in traditional post-secondary education.

The main clientele would be secondary graduates who would enter the labor market at relatively lower levels and seek mobility through recurrent educational participation. The principal forms of recurrent

education would be those that were highly related to job and career needs. The major obstacles to realizing these types of shifts are that even fewer job opportunities are available for secondary graduates than for university graduates, and employers tend to use credentials at the point of labor market entry for assigning workers to occupational strata. Unless jobs become more plentiful at the secondary level and career mobility becomes closely linked with recurrent educational experiences rather than initial credentials, it is unlikely that a profound shift in educational patterns will result.

(4) Worker Participation

A rationale for recurrent education that is especially strong in Western Europe is the use of the approach to improve the quality of working life through worker participation. An underlying assumption is that working life is oppressive because of the high degree of division of labor as well as the systems of managerial control which alienate workers from the work process as well as their fellow workers. The response has been to develop a variety of ways in which workers can participate either directly or through representation in making decisions which affect both the overall organization and functioning of the workplace as well as daily work operations on the shop floor.

Broadly speaking, this movement has come to be called "industrial" or "workplace democracy." In part, the movement has been a response by employers to increase the intrinsic attractiveness of the workplace through greater worker participation in order to reduce

high levels of worker turnover and absenteeism and to raise productivity. In part, it has resulted from laws and collective bargaining agreements supported by labor which have mandated worker participation in the operations of the firm. For example, the co-determination laws of West Germany require worker members on the boards of directors of large firms as well as worker councils for joint determination of employment and work operations (Furstenburg 197'). Sweden has a national law requiring worker participation on all major decisions regarding employment and the nature and distribution of work (Ministry of Education 1975). Other nations have also experienced increasing worker participation in their enterprises as well as government sponsorship of initiatives in this direction.

The need for recurrent education under such circumstances is to educate workers about their responsibilities and functions in a participative organization; to provide them with the knowledge that they will need to make good decisions; and to enable them to develop more fully their other skills for both occupational advancement and human development (Schuller 1981; Turner and Count 1981). Specific forms of recurrent education include the availability of educational and training sabbaticals, worker circles for discussion of all pertinent issues relative to the role of workers in such organization, and the availability of courses for workers on the basis of sufficient worker demand. Clearly the audience for this form of recurrent education is that of the present workforce.

(5) Improving Quality of Leisure

Advocates of recurrent education for improving the quality of leisure often assume that a high standard of living in the industrialized countries requires a minute division of labor where most jobs have little skill content and are highly routinized. Therefore, they see little hope of transforming work into a more humane activity without a large sacrifice in living standards. But, they would argue that the redemption of this approach is that an "inhuman" technology has tended to shorten the work week and increase the amount of leisure that workers can enjoy.

Therefore, if the price of such affluence has been the destruction of the human spirit in the workplace as Terkel (1974) has emphasized, the response must be to resurrect it outside of the workplace through bringing music, poetry, art, and other forms of cultural development into the lives of workers through recurrent or lifelong educational approaches. The clientele for recurrent education would include virtually all adults, and the opportunities would be scheduled during evenings, weekends, vacations, and other heavy concentrations of leisure hours. A major audience would be that of senior citizens who have retired from the workplace. Presumably, the alienation of the workplace or the home in the case of housewives would be compensated by gains in intellectual stimulation, spirituality, social interchange, knowledge, and human development provided by recurrent educational activities outside of work.

(6) Reducing Inequalities of Disadvantaged

Much discussion of recurrent education has viewed it as a way of redressing inequalities that emanate from the social origins of workers and their previous education (Levin 1978). Because it has been evident that previous levels of educational attainment and their occupational rewards are heavily conditioned by the social origins of workers, recurrent education is seen as an opportunity for providing further educational opportunities for those workers who are least advantaged in labor markets. In particular, workers who are most susceptible to employment or underemployment by virtue of their previous educational experiences would represent the primary target for eligibility and financing of recurrent education. The expectation is that by using recurrent education to compensate this group for their labor market disadvantages, it will be possible to increase their occupational and earnings mobility. Indeed, this is largely the premise behind the various publicly-supported training programs for the disadvantaged found in the U.S. (Mirengoff and Rindler 1976) and western Europe.

This approach to recurrent education focuses primarily on persons who are susceptible to unemployment and who are relatively unskilled. Recurrent education strategies include an attempt to provide basic academic skills where these were lacking as well as specific job training. A broader version of using recurrent education for reducing inequality would integrate a "pro-disadvantaged" approach into a national system of recurrent education. The disadvantaged would be given greater financial assistance and a wider range of choices to

meet their special needs. In this way, the concern for equalization could be integrated into comprehensive approaches to recurrent education for the entire population.

(7) Improving Social Participation

A related perspective on recurrent education is that of increasing social participation more broadly in political, economic, and cultural life. Under this framework, recurrent education is viewed as a way of increasing the democratization of political, economic, social, and cultural participation by providing educational experiences that enhance the ability of those who are least likely and able to participate in these spheres of life. For example, persons from less advantaged educational and work backgrounds tend to participate less in the political process and tend to have greater difficulty in understanding complex political issues. Recurrent educational strategies could focus on increasing political participation by getting such persons more deeply involved in political discussions and more nearly conversant with the important issues.

The attempt to increase social participation in all spheres of life by those who are most disenfranchised could extend to literacy, family planning, consumer knowledge, health and hygiene, and utilization of the political process to attain objectives. For example, senior citizens could be provided with instruction and other forms of experience that would increase their ability to organize collectively to meet their needs. Recurrent educational opportunities

could also focus on greater involvement in the performing and fine arts and voluntary community services as well as providing them with knowledge on nutrition and health care unique to their situations.

Clientele would be drawn largely from those groups who have the lowest levels of social participation and the fewest resources to improve their circumstances. These groups might include lower level workers, housewives, the handicapped, senior citizens, and poverty populations. Essentially, recurrent education would be used as a way to provide the knowledge to increase participation and create social progress for those groups who are least able to provide such results on their own behalf. This approach to recurrent education is profoundly and overtly political, and it is inherently more controversial than the political motives of most other approaches.

(8) Rescuing Educational Institutions

At odds with the motive for using recurrent education to reduce overeducation is that of using it to rescue educational institutions that are losing enrollments because of reductions in the population of youth. Virtually all of the highly industrialized countries are experiencing historically low birth rates that have resulted in demographic shifts in the population (Acsadi and Johnson-Acsadi 1980). As the population grows older, there are fewer persons in the age groups that have taken traditional forms of post-secondary education, so colleges and universities are facing declines in enrollments. Particularly affected are those institutions that proliferated and expanded to meet the earlier demographic bulges from the "baby boom"

period. A major strategy for maintaining enrollment levels has been for institutions to seek new clientele and educational directions.

Clearly, a major source of such clientele are those persons who are in the workplace or home who are beyond the normal age for post-secondary participation. By providing recurrent educational opportunities to these persons, it is hoped that empty classrooms and deficit budgets can be avoided. Indeed, the principal motive of many post-secondary institutions in promoting recurrent education is that of institutional survival. To support this quest, such institutions have started satellite campuses in local communities and in corporate and government workplaces to attract students; have granted credits for "life" experiences to increase the attractiveness of further study towards a degree; have promoted more flexible degree requirements in terms of both scheduling and rigor with evening and weekend offerings and minimal library demands on students; and have expanded the range of offerings in both programs providing credit towards degrees and those that do not. Although many of these strategies have also tended to comprise the quality of educational offerings, a deterioration of quality should not be considered intrinsic to the expansion of recurrent education.

(9) "Deschooling" of the Post-Compulsory System

A final motive for expanding recurrent education is to replace more generally the highly institutionalized forms of traditional schooling. In this respect, it is argued that mandatory schooling is coercive and that even traditional post-secondary education has become

mandatory for those who seek to achieve placement in higher occupations. By making the routes for both training and occupational achievement more flexible and subject to individual demand and choice, much unnecessary schooling will be eliminated and coercion will be reduced. Since this view is often held by those like Ivan Illich (1971), who wish to see a "deschooling of society," it can be characterized under that rubric. The expectation is that such a system would be more flexible and efficient in the use of resources as well as more humane.

All persons beyond compulsory school age would constitute the clientele for such an approach, and the educational offerings would simply depend on what was demanded in the educational marketplace. Illich (1971) has suggested that every community could have documentation centers using the latest technology which would make available through printed and electronic media what any person would want to know on any subject. Individuals would learn how to use such centers to instruct themselves on topics that arose in their daily work lives, politics, or social relations or on which they were curious. Issues of social priorities in what would be offered or who would be served would not be of importance under such an arrangement, since it would be designed to minimize government regulations and other institutional encumbrances. However, it is conceivable that a regulated market approach might be developed with government-funded educational entitlements that could be used to pay for any recurrent educational offerings that met certain stipulated criteria. Clearly,

recurrent educational approaches responding to the deschooling motive could vary from unregulated ones with little government support to highly regulated situations with continuing government funding and involvement.

Political and Economic Challenges

Thus far we have presented some nine different motives for advocating the systematic expansion of recurrent education. For many observers at least some of them will represent persuasive arguments for recurrent education. Taken together, one might think that the political and economic support for recurrent education would be substantial. Yet, paradoxically, the very diversity of approaches may be the greatest political obstacle to adoption and implementation.

The political challenges can be seen most clearly if one looks at the different versions of recurrent education in terms of their rationales, clientele, and principal applications. Even a cursory comparison would suggest considerable differences among them that may inhibit the formation of political constituencies. Before reviewing these areas of potential discord, it is important to note that virtually all of the approaches can be viewed under three themes: those contributing to improvements in the functioning of labor markets and productivity; those contributing to improved social participation and equity; and those that are designed to achieve major institutional change.

1- Labor Market and Productivity Strategies

a- Increasing Productive Efficiency

b- Reducing Unemployment

c- Reducing Overeducation and Underemployment

2- Social Participation and Equity

a- Worker Participation

b- Improving Quality of Leisure

c- Reducing Inequalities of Disadvantaged

d- Improving Social Participation

3- Institutional Change

a- Rescuing Educational Institutions

b- Deschooling of the Post-Compulsory System

Even among these three major areas, there are substantial differences in goals and constituencies. For example, the enhancement of social participation and equity may be important goals on their own merits, but they are not designed to contribute to institutional change or increase productivity. To some degree the various approaches are in conflict, for, at the very least, resources that are committed to one version may be lost for the pursuit of other approaches.

However, incompatibility between specific approaches is even more acute when one compares each of the nine versions in Table One. Even within major categories such as institutional change, the strategies differ immensely in objectives and clientele. For example, the use of

recurrent education to broaden the mission of post-secondary educational institutions that are losing enrollments represents an attempt to strengthen existing institutional forms, a goal that is sharply in contrast with the motive of deschooling post-compulsory education. Using recurrent education to reduce "overeducation" or the underutilization of educated labor is also incompatible with using it to rescue traditional post-secondary educational institutions. These conflicts are also evident in comparisons of many of the other categories, so it is difficult to see how a single, comprehensive plan for recurrent education could encompass all of the various approaches.

Indeed, this situation seems to be a major political weakness of recurrent education in the past, especially for the United States. A single rubric has been used to refer to what are essentially a variety of competing and conflicting versions of lifelong education. By bringing them under a single descriptive term- recurrent education--it has been possible to get a large and diverse coalition to support the concept in the abstract. However, any implementation of recurrent education would obviously require that specific forms be adopted and financed which would either neglect or be incompatible with other forms. That is, once the broad notion of recurrent education is translated into particular strategies with particular goals, it becomes a narrower concept that may support the objectives of one constituency, but at the expense of another. In the U.S. there has been an indeterminacy in forging a politically acceptable strategy for

implementation. This political challenge must be overcome in the future.

The economic obstacles are inherent in the present disincentives for individuals to undertake the recurrent education route in place of the traditional one. In order to make recurrent education vocationally relevant, a number of conditions must be met. (1) Employment opportunities must be readily available for persons who have completed high school and not continued into post-secondary education. (2) Career ladders and training options must be provided in conjunction with such jobs. And, (3), later participation in and completion of educational programs on a recurrent basis must provide occupational advancement and income that are commensurate with the cost of those training programs and their value when completed prior to entering the labor force.

The availability of employment is an obvious and important requirement for individuals to take jobs prior to completing their formal education and training to pursue recurrent educational strategies. Presumably, individuals could begin their careers at entry levels and undertake additional education and training as needed. Thus, numerous work opportunities must be available for high school graduates. Unfortunately, unemployment rates for young high school graduates are substantial and considerably higher than for college graduates. For example, in March 1979 the U.S. unemployment rate for high school graduates 16-17 years of age was about 24 percent and for 18-19 year olds was almost 12 percent, although the overall

unemployment rate for all groups was about 6 percent (U.S. Department of Labor 1981: A-22). Thus, high school graduates who were under 20 years of age had unemployment rates that were two to four times the national average. Since that time unemployment rates have risen in all categories, and the relatively poor position of young high school graduates has deteriorated further. The data suggest that many individuals will have difficulty in finding the employment necessary to pursue a recurrent educational strategy, and the incentives may be in the direction of improving employment possibilities through taking a college degree prior to entering the labor market in spite of the problems faced by those with college degrees (Freeman 1976; Rumberger 1981).

This disincentive is further reinforced by the nature of entry-level positions in the labor market. To a large degree these positions are not the first steps on a career ladder, but are "dead-end" positions that lead nowhere (Brown 1982). Examples include one of the primary sectors for employment of untrained youth, fast-food restaurants. This industry is predicated upon operations that are largely determined by the machines and technology employed, so that the simple labor operations can be learned quickly and few skills are learned on the job. Further, there are few positions above this entry-level, since relatively small numbers of supervisors can monitor very large numbers of workers on jobs that are so highly routinized. Although fast-food preparation in the past meant that individuals might develop skills as "short-order" cooks which could be

transferred to more advanced kitchen and restaurant positions, this is not likely to be the case today.

Such jobs do not lend themselves to a demand for recurrent education and training for skill development because of the lack of career ladders in such employments. Rather, they reinforce the view that these are "dead-end" jobs, and the only way to improve one's employment is to get a more advanced credential that will provide employment opportunities in better occupations. Thus, both the relative dearth of jobs and the lack of career ladders for those jobs that are available tend to discourage individuals from considering recurrent educational strategies.

Beyond these disincentives to pursuing recurrent education in place of more traditional educational patterns, there is the related issue of availability of training opportunities within firms. Unfortunately, many entry-level positions neither lead to career opportunities that require additional skills nor do they provide opportunities to learn new skills on the job. The most extensive training programs are generally provided for persons who have already acquired considerable formal education, generally at least at the level of a university degree. This also leads to incentives to complete post-secondary education prior to joining the labor force.

Finally, the issue arises as to whether individuals acquiring training and education in the recurrent fashion will do as well in the job market as persons who have acquired formal educational credentials prior to entering careers. For example, assume that a high school

graduate decides to take a position as a clerical or assembly worker while pursuing a B.A. degree simultaneously on a part-time basis. The question is how that person will be viewed on the labor market when he or she completes the B.A. degree and applies for a management training position. One might think that a person with other work experience at lower levels would be even a more attractive candidate for a management trainee position than an inexperienced graduate with the same level of formal education.

However, it is not clear that firms behave in that way. An assembly worker or clerical worker with a new B.A. degree obtained on a part-time basis is more likely to be treated as an assembly worker or clerical worker who has over-achieved, while the inexperienced worker with the newly acquired B.A. that was earned on a full-time basis is considered to be the more appropriate candidate for management training. In the U.S. one finds few recipients of law degrees or M.B.A. degrees, who have studied on a part-time basis, being considered for the most prestigious positions requiring these credentials. That is, firms do not seem to attach the same weight to part-time study as equivalent full-time study in making hiring and promotion decisions.

In summary, the logic of recurrent education in the aggregate for improving the efficiency and equity of utilization and training of human resources is not matched by appropriate incentives to individuals to forego traditional educational patterns for recurrent ones. From all of the information available it seems reasonable to

conclude that higher employment rates, better jobs and career mobility ladders, greater access to on-the-job training, and greater success in obtaining access to prestigious positions are available to those who enter the labor market with at the least the completion of a university degree. Finally, it is important to note that financial aid is rarely available for the part-time student, creating an additional disincentive to undertake a more flexible approach to post-secondary education and training. This situation does not serve to promote the more flexible work and study patterns associated with recurrent education. Yet, the near future appears to be a time when these challenges will be overcome and recurrent education will become more fully recognized as a force for improving training, employment, and productivity.

Recurrent Education as a Rising Star

In the last two decades of the twentieth century, two phenomena will make recurrent education a vital strategy for promoting workplace productivity, employment, and occupational mobility. The first is the fact that enormous shifts in occupational skills will take place as old industries subside and new ones take their place. At the same time there will no longer be massive inflows of new workers with the latest training, so adaptation and retraining will necessarily need to focus largely on the existing workforce. Second, while relative expansion of high technology jobs will be substantial, such expansion will account for only a small proportion of new job positions. Most of the expansion of employment will be in relatively low skill areas

which suggest modest initial educational qualifications and a need for further education and training to create mobility and avoid a caste-like segmentation of large numbers of workers in low skill jobs. Let us consider each of these in turn.

It is widely accepted that as the U.S. and western Europe recover from the serious economic situation of the seventies and early eighties, that the composition of industries and employment will change drastically. The production of steel, automobiles, and heavy machinery will have shifted substantially and continue to shift to such third world countries as Brazil, South Korea, and Taiwan, often under the aegis of multi-national corporations that are headquartered in the industrial countries. At the same time, new industries will be rising and experiencing rapid growth in micro-electronics, micro-computers, computer applications and software, robotics, and bio-technology. Beyond the rise and expansion of these industries themselves, their products will have profound effects on the nature of the work process and production in existing workplaces. The use of robotics and micro-processors to execute and control production will alter the characteristics of the workplace and the skills and training required of workers, and bio-technology should have profound effects on the production of chemicals and pharmaceuticals.

Although the transformation of industry and the workplace has certainly been a constant feature of the nineteenth and twentieth centuries, the pace of change is accelerating because of rapid technological developments in conjunction with information advances

that permit extremely rapid diffusion of technology in conjunction with a desperate search for higher profits at a time of poor economic performance.

At the same time there will a drastic decline in the inflow of newly trained workers, as falling birth rates in the industrialized countries have reduced the number and proportion of young persons. In the recent past, the need for workers with advanced skills was largely met through the introduction of newly-educated workers into the labor force. This fact is reflected dramatically in estimates of the U.S. Department of Labor: while the labor force grew at an annual rate of about 2.2 percent between 1965-75 and 2.7 percent in 1975-79, the rate of increase will fall to 1.9 percent in 1979-85, 1.3 percent in 1985-90 and less than 1 percent in 1990-95 (Fullerton 1982: 49). Although there was a net addition of over ten million workers to the labor force in the four year period, 1975-79, the net addition projected for the five year period, 1990-95 is less than six million (Fullerton 1982: 51).

This means that to a sharply increased extent, the development of new skills to match the jobs generated by both industrial shifts and new technologies will have to be met through training and retraining of the existing labor force. And, it is difficult to see how this massive task can be accomplished efficiently without the initiation of a comprehensive system of recurrent education. Such a system must be organized to provide a level of comprehensiveness and adaptability that will accommodate the inevitable demands for workers with the

qualifications to meet the requirements of the new technologies and work tasks. If such a system is not forthcoming, it is conceivable that severe bottlenecks in production and costly inefficiencies in retraining will arise, since the present approach to continuing education and employer training is probably not adequate to anticipate and accommodate the enormous changes that lie ahead. For this reason, concerns for future employment and productivity will be powerful stimuli for the development by both states and the national government of a systematic and responsive approach to the promotion and provision of recurrent education.

The second important reason that recurrent education is likely to become a more important factor on the political and educational agenda is the urgency of avoiding a permanent under-class of unskilled and low paid workers. So-called high technology jobs will be expanding at a faster rate than many of the more traditional ones, but they will represent only a very small portion of the total number of new jobs that will be created in the next two decades. For example, although the number of positions for such jobs as computer operators is expected to double in the 1978-1990 period, this will amount to the net creation of only about 160,000 new jobs in that area (Carey 1982: 42). However, during the same period, the number of new jobs for janitors and sextons is expected to approach almost 700,000; nurses' aides and orderlies, 594,000; sales clerks, 591,000; cashiers, 546,000; waiters/waitresses, 532,000; general office clerks, (530,000); and food preparation and service workers in fast food

restaurants, 492,000 (Carey 1982: 40). In fact among the twenty occupations that are expected to generate the most new jobs, there are no high technology occupations represented, and no more than four seem to require any post-secondary education: professional nurses, elementary schoolteachers, accountants and auditors, and licensed practical nurses (if we assume that office skills can be acquired in secondary school). Even more important is the dearth of possibilities for career mobility, for in most of these cases there are no career ladders that are evident. That is, one does not move from the job of janitor to that of a skilled worker under normal circumstances, and in many cases there are simply few higher level positions of any sort in the firms that will hire this labor. Thus, we are facing an expansion of unskilled jobs that will typically lack opportunities for advancement in the absence of further training.

To a large degree, the sole hope for occupational mobility for vast segments of the labor force will lie in the establishment of a system of recurrent education that will prepare persons entering these jobs for the relatively smaller number of jobs in the economy that will require higher skills. That is, although large numbers of persons will enter jobs requiring little preparation and training, they will be able to advance to more demanding and remunerative work only if the opportunities to acquire appropriate training are available. By having such opportunities, the incentives to take lower level jobs and to perform well will be enhanced by the promise of more advanced training and opportunities. In this way, firms will be able

to fill jobs at the lower levels, while workers who take those jobs can have access to the training required for upward mobility. At the present time, the very high turnover of workers in such positions is largely attributible to the routine nature and "dead end" careers associated with such jobs in combination with a lack of access to further career training opportunities.

It may even be appropriate to tie eligibility for subsidized recurrent education opportunities to employment tenure so that individuals who spend a year or more in one of these ubiquitous low skill areas will be rewarded with an expanded list of training options for higher level employment. It is important to point out that much of such training must necessarily be made available outside of the place of employment, since many employers of low skill workers will not have the resources or higher skill positions to train workers for.

In summary, both the need to adapt an existing labor force to industrial shifts and changes in technology as well as the need to provide mobility routes for large numbers of workers who will be forced to accept employment in unskilled occupations that lack career ladders will necessitate consideration of a new system of training and retraining of the work force. It is exactly these needs that are addressed most fully by a comprehensive system of recurrent education, and pressures from both directions will contribute to the formation of such a system.

Financing Recurrent Education

As we stated at the outset, the goal of recurrent education is to create mechanisms that will promote alternative education and work patterns that can draw upon existing resources while providing incentives for new ones to emerge in a systematic way. Such a system would improve education, training, employment, and productivity by making access to a comprehensive system of recurrent education a universal option for individuals and firms while utilizing educational resources more effectively than the traditional pattern that places so much urgency on completing one's formal education and training before seeking regular employment.

The focus of the volume (Levin and Schütze 1983) which is introduced by this essay is not to design a single approach to financing recurrent education as much as it is to set out alternatives for doing so. Depending on the goals of recurrent education and the existence of supportive resources, there are many different approaches that can be pursued. The purpose of the essays included in the volume is to provide a provocative discussion of these alternatives so that they can be evaluated according to their strengths and weaknesses and be used as a basis for further discussion, planning, and action. The first part of the book addresses the complex issues surrounding overall models for financing recurrent education. The second part examines the finance of recurrent educational programs in the U.S.; and the third part explores the financing of paid educational leave, with four case studies from western Europe.

1. Comprehensive Models for Financing Recurrent Education

The purpose of this section of the book is to set out several models for financing education that might be evaluated with regard to such criteria as equity, flexibility, comprehensiveness, efficiency, cost, and the distribution of the cost burden. Three different financing approaches are presented, and they are assessed along with other financing possibilities in a common framework.

The chapter by Henry M. Levin on "Individual Entitlements for Recurrent Education" constructs the case for financing recurrent education through the issue of vouchers or entitlements to individuals at the time that they complete their compulsory education requirements. The entitlements could be used for a wide variety of education and training opportunities including colleges and universities, employer or union-sponsored training programs, correspondence courses, apprenticeships, and so on. Entitlements would be based upon both loans and grants, with the composition between the two dependent upon family resources. The ingredients of a system of finance, regulation, and information are discussed, and the experience of the G.I. Bill by which educational entitlements were provided to military veterans is used to evaluate the efficiency, equity, and responsiveness of the entitlement approach.

In contrast, Gosta Rehn proposes a different approach in "Financing Recurrent Education By A System of Individual Drawing Rights." Each person would be able to use a portion of his social security account to take educational leave from work to retrain or to prepare for other careers. The goal of the approach would be to

maximize the ability of individuals to allocate their time among work, study, and leisure over the life-span. These choices would be integrated into an active labor market policy that would create incentives for individuals to use their drawing rights for recurrent education when job prospects in their industries were declining and jobs were expanding in other industries. The plan might also augment drawing rights for the poor and handicapped in order to provide greater social equity. A major advantage is that existing social security accounts could be used as a basis for expanding individual choice, while supporting a diverse set of possibilities for participating in recurrent education.

A third approach is presented by Werner Clement in "Intermediate ('Parafiscal') Financing Schemes for Recurrent Education." Under this approach, the focus for financing recurrent education would be such intermediate entities as trade unions, employer associations, professional organizations, and other voluntary groups. The government would enable any such group to levy taxes on its members to support a program of recurrent education that would address its specific needs. Under such an arrangement, Clement suggests that people would be able to express their preferences for recurrent education through groups of a convenient size with common goals and that costs would be reduced while participation would be encouraged.

In the final essay in this section, Dieter Timmermann attempts to evaluate these three plans as well as others in "The Impact of Financing Mechanisms on Post-Compulsory Education and Training." A

number of criteria are established, and a self-financing or market model, a single-employer financing model, and a state financing model are assessed in addition to those using entitlements, drawing rights, and intermediate institutions. Timmermann concludes that a mixed model incorporating aspects of each of the "pure" models might be most appropriate.

Financing Recurrent Education in the United States

Such traditional activities as adult education, university and college extension courses, on-the-job training, military training, other government training programs, and trade union educational and apprenticeship programs can all be incorporated into a comprehensive approach to recurrent education. But, since these educational and training programs are funded and sponsored by a wide range of state, local and federal government agencies as well as private benefactors, it is difficult to know the extent of such programs, their sources of support, and the magnitude of participation and funding. This section of the volume represents a selective survey of recurrent education activities and their funding in the U.S.

Alan Wagner attempts to piece together the myriad of existing programs in his paper, "An Inventory of Post-Compulsory Education and Training Programs in the U.S. and Sources of Support." On the basis of his detective work, he concludes that in 1980 about 50 million individuals in the U.S. participated in at least one type of organized learning activity within the recurrent educational rubric, and the estimated costs were in the neighborhood of $35 billion. Wagner

attempts to review the types and magnitudes of each type of program and the costs and sources of funding. Finally, he provides information on the characteristics of participants by sex, age, race, and employment status. Thus, his paper serves as a useful background for understanding the financial scope of present approaches to recurrent education in the U.S.

Although employer-sponsored education is acknowledged widely as being a substantial part of the existing system of recurrent education, surprisingly little systematic analysis of this mode of education has been carried out. This is the subject of "Employer-Sponsored Programs of Recurrent Education," by Gregory Smith. Smith focuses on the purposes, forms, effects, and magnitude of training programs that are financed by employers. After this general survey, he addresses one of the most prevalent forms of employer-sponsored programs in recurrent education, tuition-assistance programs. Most of these programs suffer from low rates of employee participation, so Smith has chosen to review three particular cases which seem to be relatively more effective to ascertain what can be learned about making such programs more attractive and useful.

Clearly, unions also have an important stake in the recurrent education of their members. Only recently have there been concerted efforts to understand the extent of union involvement in recurrent education, generally, and the degree to which such provisions are financed by collective bargaining agreements, specifically. In "Unions and Postsecondary Education," Nevzer Stacy and Ivan Charner

examine the role of unions. Specific types of programs and subsidies for recurrent educational activities are examined, and illustrative programs are indicated. The authors also reflect on emerging factors which may make such educational and training programs more important in the future, and they suggest that unions would be wise to consider these issues in their future policies.

Just as the recurrent education phenomenon began to become more fully articulated, a movement with important implications for public funding of programs gained momentum, the tax and expenditure limitation movement. In states like California with its Proposition 13 and in Massachusetts with Proposition 2-1/2, state initiatives limited tax revenues from the property tax. Other states have passed expenditure limitation measures, and the thrust of federal policy is also in this direction with the substantial tax and expenditure cuts of the Reagan administration.

In "Tax Limitation Measures: Their Impact on Recurrent Education in California," Harold Geiogue examines the impact of the $7 billion reduction in property taxes generated by the passage of California's Proposition 13 in 1978. Because of its weaker political constituency relative to that of the more entrenched forms of education, Geiogue found that recurrent educational offerings seem to have experienced greater funding reductions than more traditional forms of postsecondary education. He concludes with an analysis and interpretation of this phenomenon, a view which is not optimistic with

respect to the future of recurrent education under conditions of budgetary stress.

In the U.S., much of the overall discussion of recurrent education has been situated at the federal level. In the autumn of 1980, the Education Amendments of 1980 were signed by President Carter providing an expansion of educational opportunity for adults and a commitment to recurrent education. In "An Opportunity Deferred: Recurrent Education in the United States," Pamela Christoffel reviews the history of recurrent education at the federal level with major attention to the background and details of the 1980 Amendments. Unfortunately, the exciting and productive changes that would have served to provide a federal stimulus to recurrent education did not receive funding appropriations at a time of severe budgetary distress. Nevertheless, they represent a background at the federal level for what might follow as the economy improves and job retraining becomes more pressing.

Overall, then, the rather rapid developments that took place in the United States in recurrent education have experienced setbacks in recent years, largely because of a poor economy and government fiscal stringencies. As we have argued above, we view this situation as one which is temporary in nature, for the realities of a slowdown in labor force growth and drastic changes in the structure of industries and occupations will create renewed pressures for more comprehensive ways of providing and funding recurrent education. An important aspect of

that development might certainly be the provision of educational leave policies.

Financing Paid Educational Leave

Working individuals need access not only to recurrent educational opportunities for pursuing further education and training over their working lives, but they also need the time to dedicate themselves to further study. While in some cases this study can take place outside of working hours, for example during weekends and evenings, in other cases the intensity and depth of recurrent education and training will require a period of study that is unfettered by work obligations. In 1974, the International Labor Organization (ILO) Convention expressed a commitment to the granting of paid educational leave for the purpose of training at any level. Many countries in western Europe have moved in this direction by providing educational leave of absence provisions for workers. Since these may have profound consequences for future U.S. policies, this final section of the volume reviews four rather different approaches to financing educational leave.

It is generally recognized that Sweden has gone farther than virtually all of the western European countries in providing training and educational opportunities for adults. In "Financing Recurrent Education: The Swedish Model," Kjell Rubenson, reviews the background and overall approach for financing recurrent educational opportunities in Sweden. Of particular importance is the integration of financial support for recurrent education that includes both the direct costs of the education and training as well as a stipend for covering the

living costs of the participants. These programs are part of the overall labor market policies in Sweden, and they are designed to contribute to maintaining high levels of employment and productivity growth.

One of the earliest national laws regarding paid educational and training leave is the French Act of 1971. In 1979 almost three million French workers took part in training activities at a cost of almost three billion dollars. In "Training Leave Under the French Law on Continuing Vocational Training," Pierre Caspar reviews the French experience as well as the patterns of financing and participation. Caspar suggests that there are a number of lessons to be learned from the French case, especially the need to avoid over-regulation and the proliferation of detailed legal statutes on permissable program activities. He also suggests that many workers fear that if they take paid educational leave, their jobs may evaporate during their absence.

In contrast with France and its national laws, provisions for paid educational leave in West Germany are provided primarily at the state level. In "Educational Leave in the Federal Republic of Germany," Hans G. Schütze examines the provisions and experiences of the five states that have adopted extensive leave policies. Important comparisons are made of both the laws of the different states and their patterns of participation. Interestingly, although both the national setting and level of government sponsorship differ between the French and German cases, the Schütze essay reports many parallels with respect to patterns of participation. The state-oriented nature

of the West German approach is likely to be of particular interest in the United States where so much of the responsibility for education is concentrated at the state level.

The final chapter on "Paid Educational Leave With Particular Emphasis On Its Financial Aspects" by Louis Emmerij represents both a review of the Dutch situation as well as a novel proposal. Emmerij proposes that the payments that are presently used for public assistance and unemployment compensation for unemployed workers be used to provide paid educational leave. Not only does he argue that such a policy would use more efficiently the funds that are already being spent on the unemployed by retraining them and increasing their marketable skills, but he suggests that systematic participation of employed workers in recurrent educational programs would open up considerable job opportunities for new workers. That is, the openings created by the constant movement of the experienced workforce into recurrent educational and training programs will serve to introduce new workers to those jobs and provide job mobility for workers at lower levels.

Thus, the variety of schemes for paid educational leave in western Europe represents a provocative set of experiences for U.S. consideration of such policies. The French and Swedish cases provide insights into national financing provisions and costs, and the West German case demonstrates how states might adopt and implement paid educational leave policies. As the Emmerij essay suggests, such a policy can reduce unemployment and can be funded substantially from

the various forms of public assistance and unemployment compensation that are presently used to support the unemployed. By implication, a U.S. policy might incorporate the participation of both states and the federal government, while integrating paid educational leave into overall policies for reducing unemployment and increasing productivity.

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